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1 TECHNICAL EVALUATION FACTORS FOR AWARD

1.1 Method of Evaluation

The technical evaluation factors set forth below are provided for informational purposes only. The Government has not finalized the methodology or scoring plan for evaluating offers.

1.2 Contractor Support

Offerors are hereby notified that EPA is contemplating the use of private companies/ organizations to provide assistance during this acquisition. In the event that the use of contractor support during the evaluation process is approved, the supporting contractor(s) will be disclosed to the public and the contractor(s) will be subject to appropriate conflict of interest rules, standards of conduct, nondisclosure agreements, and confidentiality restrictions.

1.3 Screening

Each offeror's response to the Down-Select Requirements Matrix (See Attachment XX) will be evaluated. In order to be considered acceptable, the Offeror must indicate that they can satisfy the requirement by responding with a "Yes" (Y). The Offeror shall include the rationale to explain how the criterion is satisfied. If the Offeror is unable to satisfy the requirement (N) on any item, the response will be considered unacceptable. Unsuccessful/unacceptable responses to the down-select criteria will eliminate that Offeror from further consideration.

1.4 Basis of Award

Award will be made to the Offeror whose proposal demonstrates a solution that best addresses the requests specified in the Statement of Objectives, and which represents the best value to the EPA. The best value selection decision will be made as described below.

The EPA will make award to the responsible offeror(s) whose offer conforms to the solicitation and is most advantageous to the EPA cost or other factors considered. For this solicitation, all evaluation factors other than cost or price when combined are significantly more important than cost or price. The Technical Merit, as described below is more important than the Oral Presentation and Solution Demonstration. In combination, the Technical Merit and Oral Presentation and Solution Demonstration are more important than Price.

1.4.1 Technical Merit

If the Offeror's proposal successfully passes the screening process, it will be evaluated further on technical merit. The following are the Technical Merit evaluation factors:

Factor 1 – Technical and Functional Evaluation

The Technical and Functional aspects of the proposed solution will be evaluated based on the following criteria:

Software Solution

EPA will evaluate:

- The degree to which the Offeror's solution complies with the requirements specified in the Requirements Response Matrices;
- The efficiency and effectiveness of the Offeror's release management of the proposed software, to determine product stability;
- The Offeror's commitment to the federal market and e-EPA initiatives; (i.e., has Offeror already built adapters to CCR, e-Travel, etc., sponsors user support groups and describes what type of budget they apply to research and development.)
- The availability of pre-built integration adapters / connectors among components of solution and between solution and other applications; and
- The ability of the proposed solution to fit with EPA Enterprise Architecture (refer to the CONOPS for further information on EPA Enterprise Architecture).

Implementation

EPA will evaluate:

- The Offeror's demonstrated understanding and compliance with the performance objectives, guiding principles, and activities described in the Statement of Objectives;
- The Offeror's demonstrated understanding of EPA's business environment and challenges as outlined in the CONOPS;
- The Offeror's effectiveness of methodologies proposed to move EPA from the current to the future state as discussed in the CONOPS;
- The Offeror's demonstrated ability to perform migration activities;
- The realistic nature of the proposed implementation schedule (e.g., activities, durations, dependencies);
- The thoroughness and reasonableness of the risk management approach and mitigation strategies;
- The validity and reasonableness of the technical and functional assumptions; and
- The ability to demonstrate the Offeror's implementation is based on mature, effective processes. Organizations able to demonstrate certification at a Capability Maturity Model Integration (CMMI) level III will be deemed to meet this expectation. A copy of the most recent certification must be included in the response to the RFQ. Other evidence may be provided, but will not have the weight of CMMI certification.)

Hosting

EPA will evaluate:

- The Offeror's self-evaluation against the Financial Management Line of Business, Center of Excellence, Due Diligence Checklist (http://www.epa.gov/ocfo/modernization/pdfs/due_dil_checklist.pdf);
- The Offeror's self assessment against the Tier III criteria established by the Uptime Institute®;
- The Offeror's most recent Type II SAS 70 evaluation.

- The Offeror's self assessment against the security controls for moderate baseline systems as defined in NIST 800-53; and
- The completeness and appropriateness of the Offeror's proposed service level agreement.

Factor 2 – Experience and Past Performance

Experience and Past Performance

EPA will evaluate:

- The Relevance of experience and past performance of similar contracts based on size, scope, and complexity to EPA;
- The Relevance and quality of resumes and performance feedback received from references on Key Personnel;
- The Performance feedback received from Offeror's references; and
- The Performance feedback from other sources.

EPA will evaluate each Offeror's corporate experience of commensurate public sector projects of similar size, scope and complexity and its familiarity/experience with the proposed solution. The Agency reserves the right to contact the references regarding contractors, subcontractors, and staff.

EPA will evaluate each Offeror's past performance as a measure of the degree to which an Offeror as an organization has satisfied its customers to include (1) the quality and timeliness of the Offeror's work, (2) the Offeror's ability to estimate costs accurately and to control those cost to stay within budget, (3) the Offeror's business behavior and commitment to customer satisfaction, and (4) the Offeror's technical and management capabilities. EPA will follow the guidelines as stated in EPAAR 1552.215-75, entitled "Past Performance Information". Substantially greater weight will be given to past performance in engagements involving the key personnel being proposed for the EPA engagement.

Factor 3 – Management Approach

Management Approach

EPA will evaluate how well the Offeror's management approach demonstrates an understanding of the management complexities of the overall effort. Offerors will be evaluated on how well they demonstrate their management plan for how the entire program and management structure will be put together and will operate to meet the requirements of the contract. Offerors will be evaluated on their ability to manage the project as evidenced by the adequacy of the detailed management and control plan/procedures proposed for executing this contract.

- The Offeror's staffing approach demonstrates an understanding of the resources necessary to support the overall BPA and FSMP solution and implementation. The reasonableness and suitability of the proposed mix of personnel (both in terms of labor categories and number of people will be evaluated for realistic and appropriate nature.)
- The Offeror's identification of key and non-key personnel demonstrates an understanding of the EPA environment and is consistent with the proposed solution.

- Key Personnel and members of the proposed staff have experience in the implementation of the proposed solution and have the appropriate credentials (i.e. Project Manager is PMI-certified).
 - The proposed personnel are fully qualified to perform assigned functions based on their education, skills and experience.
 - Key personnel are certified as available.
- The Offeror's Subcontracting Plan for the effort which also supports the Agency's objectives and goals for small business utilization including small businesses, women owned, HUBZone, small disadvantaged businesses, and service disabled veteran small businesses as subcontractor(s) for this project. (Refer to <http://www.epa.gov/osdbu/goals.htm> for Agency Goals). In addition EPA will evaluate the adequacy of the Offeror's Subcontracting Plan based on the following:
 - The adequacy of the Offeror's plan for coordination with or participation by the software vendor of the proposed core financial management software system;
 - The complexity and variety of the work the subcontractor concerns are to perform; and
 - The realism of the proposal to use subcontractor concerns in the performance of the contract.
- The Offeror's demonstration of its corporate commitment to the FSMP objectives by making the resulting BPA a corporate priority;
- The quality, thoroughness, and reasonableness of the expected results, critical success factors, peer reviews, and proposed outcome measures for the FSMP solution; and
- The validity and reasonableness of the management and staffing assumptions.

1.4.2 Oral Presentation and Solution Demonstration Evaluation

The Oral Presentation and Solution Demonstration will be evaluated based on the Offeror's overall understanding of the FSMP, the composition and demonstration of skills of the Offeror's team, the ability of the solution to meet critical EPA needs.

Oral Presentation

The oral presentation will be evaluated based on the following elements:

- The extent to which the presentation shows the Offeror's understanding of e-gov initiatives;
- The extent to which the presentation shows the Offeror's understanding of the FSMP requirements; and
- The extent to which the presentation shows the Offeror's knowledge, expertise and ability to satisfy the goals and objectives of FSMP.

Solution Demonstration

The solution demonstration will be conducted to evaluate how well the Offeror's solution meets the functional and technical requirements of this solicitation, as defined in the business scenarios. In addition, the demonstration will provide input for assessing the accuracy of the "self certifying" requirements matrix. The solution demonstration will be evaluated based on the following elements:

- The ability of the solution to meet critical EPA functional and technical requirements demonstrated in the business scenarios, which will be provided by the EPA;

- The efficiency and applicability of business processing options offered by the solution for EPA;
- Navigation and ease of use qualities; and
- The effectiveness of the Offeror's team during this demonstration.